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Great design on the cheap . . . page 87

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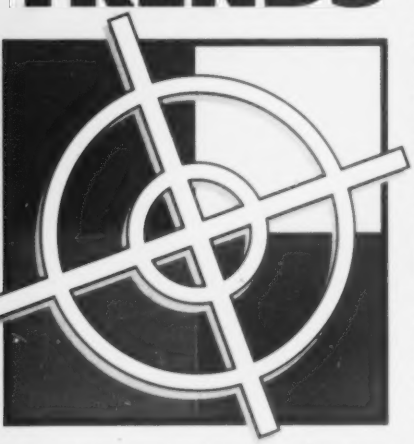
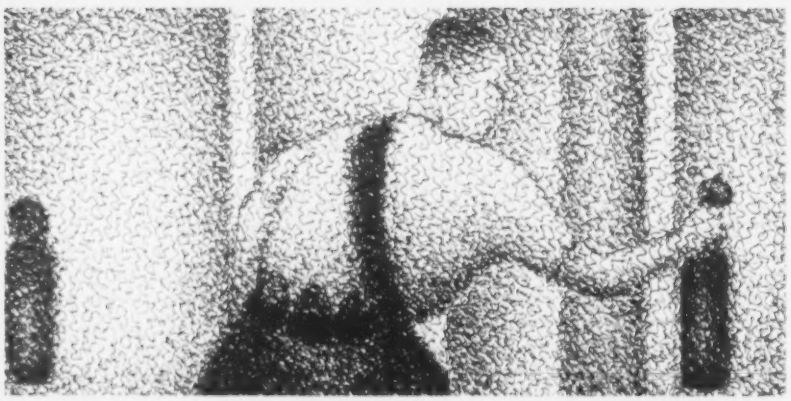
1992 PRINTING AND DISTRIBUTION TRENDS



A FOLIO: exclusive: Production executives tell you what's happening with budgets, contract negotiation, paper, printing, price breaks and more. Before you lock yourself in, learn how your peers are handling the choices available in today's market. 74



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Five basic principles that will minimize risk and enhance promotion response.

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Editor: Sean Callahan; Executive Editor: Anne M. Russell; News Editor: Tony Silber; Deputy Managing Editor: Suzanne Zelkowitz; Copy Director: Deborah Schwab; Editorial Production Manager: Holly Wallinger; Copy Editor: Lori Marden; Senior Writers: Lisa E. Phillips, Liz Horton; Staff Writer: Susan Hovey; Editorial Administrator: Rachel Drucker; Editor at Large: Keith J. Kelly; Contributing Editors: Jean Marie Angelo, Karen Burka (Lists), Len Egol (Production), Samir Husni, Paul Miller (Postal), Marilyn Much, Alan E. Sanderfoot (Midwest Correspondent).

Art Director: Cathi A. Kroha; Associate Art Director: Tracy H.M. Hubbard; Art/Production Manager: Katherine Marciante.

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From greed to need

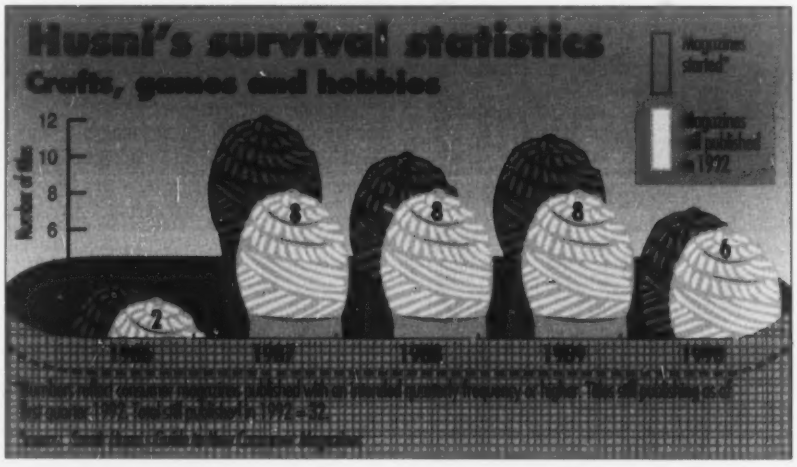
By Samir Husni

In 1984, at the beginning of the free-spending Reaganomics era, *Wood* was launched for readers who would rather construct a kitchen cabinet themselves than hire a high-priced contractor. Speaking about the craft, hobby and game sector, *Wood* editor Larry Clayton notes, "The market was huge, but the number of publications were few." But soon other publishers discovered that beneath the consumer rush to spend lavishly on durable goods—which buoyed the special-interest title in the 1980s—was another audience more interested in the products of their own labor.

Douglas L. Hicks, editorial director of *Woodsmith* and *ShopNotes* sees the market as being ideally positioned for the nineties. "These magazines are addressing the needs of people who are making their own way in the world," he says.

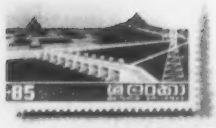
And recently, Time Warner has agreed to spend a reported $100 million to acquire Little Rock, Arkansas-based Leisure Arts (which publishes four craft titles) to add into its Southern Progress Oxmoor House unit (which publishes two craft titles).

If the motto of the 1980s, coined by Michael Douglas' character Gordon Gecko in "Wall Street" was "Greed is good," then the motto of the nineties, as reflected in the spectacular growth of practical down-home titles is "Need is better." ■



Samir Husni heads the Magazine Service Journalism Program at the U. of Mississippi and is editor of Samir Husni's Guide to New Consumer Magazines *published by* FOLIO:.

JULIE MCWILLIAMS



SINHALA NEW YEAR
(SRI LANKA)

April in Sri Lanka is filled with festivals and holidays. The Sinhala New Year is a day of celebration, but for the Post Office it's one of many days of rest this month.

RAMADAN
(SAUDI ARABIA)

During Ramadan, a month-long observance, Muslims abstain from food, drink, smoking, sex and even perfume. Suffice to say that postal service is equally joyless.

SUMMER HOLIDAY
(FRANCE)

During the month of August, virtually everyone in France is on vacation. Although post offices do remain open, their skeleton crews are no match for the country's mail.

FOS SUPPORTS THE RESPONSIBLE USE OF THE EARTH'S LIMITED RESOURCES.

ALTERNATE CURRENTS

BY STEPHEN BARR

Private delivery of magazines has had an uneven history. The concept of an entity that would offer pricing and service alternatives to the Postal Service has intrigued publishers since the 1971 Postal Reorganization Act made periodic second- and third-class rate increases inevitable. A number of companies have appeared on the scene to compete with the Postal Service over the past 21 years, but whenever postal rates stabilized, magazine interest in alternate delivery waned—and the profitability of the delivery companies withered away.

When rates for second-class mail went up an average of 22 percent in February 1991, after an 18 percent jump just three years earlier, few were surprised to discover that the private delivery business was ascendant again.

"It's very scary what's been happening with postal rate increases," says Jack Widener, director of distribution for *Newsweek*, which began using private delivery in February for the first time since the mid-1980s. "We can't afford not to take a fresh look at alternate delivery."

But this time, even with USPS assurances that the next rate hike won't come before 1994, the interest seems to be more than a wedge for lobbying against future increases. "Publishers have to be prepared to do business in different ways," Widener says. "We're in alternate delivery, so we understand how it works."

Industry experts agree that private delivery is here to stay, although their estimates of its potential market range from $800 million to $5 billion. "I don't see anything on the horizon that's going to deter the growth of this business," says Stephen Thompson, publisher of "Optimum Delivery," an industry newsletter. "What put the industry under in the past were [USPS] changes in weight allowances and rates that made private delivery uneconomical. I don't see the Postal Service doing anything today except increasing rates."

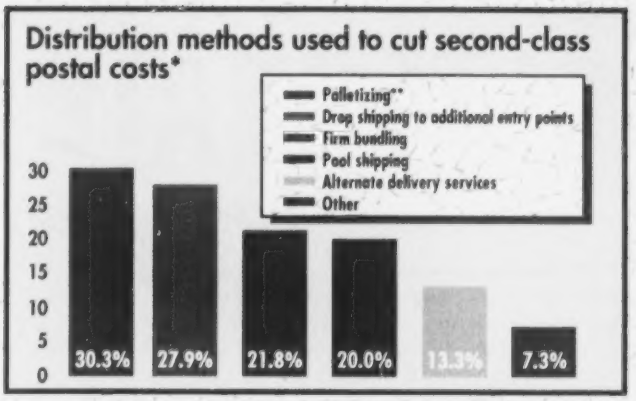
Calling private delivery a "threat" to one-quarter of the total mail stream, Associate Postmaster General Kenneth J. Hunter insists that the Postal Service will not give up delivering magazines without a struggle. "We regard private delivery as a serious, revitalized form of competition," he says. "I don't have any easy and quick answers, but I think we have the ability to push it back into its niches and keep consumer publications in the mail. It's a tough one.

AFTER A SLOW START, ALTERNATE DELIVERY IS GAINING CREDIBILITY. BUT QUESTIONS STILL REMAIN.

CHRIS RECLEY

WHAT'S THE ALTERNATIVE?

Despite USPS assurances that the next postal rate hike won't hit before 1994, smart publishers are already taking a harder look at alternate delivery. FOLIO: surveyed 165 top magazine production executives to determine how much, and for what purposes, alternate delivery is being used.



Although an average of 13 percent of all respondents report using alternate delivery, three times as many consumer magazines as business publications indicate that they're using private delivery.

Source: Research USA, Inc., Chicago

* Totals more than 100 percent because of multiple responses
**To qualify for postal sortation discounts

Delivery history is being made."

At the center of the emerging private delivery industry are Alternate Postal Delivery (APD) and Publishers Express (PE), fierce rivals competing to build their own national networks of locally owned delivery companies. Both are scrambling to recruit local newspapers for delivery operations in designated markets. The two companies then act as middlemen—setting delivery standards, offering centralized data processing and customer service, and charging magazine publishers and direct marketers about 15 percent less than postal rates.

APD, which met its goal of operating in 30 markets by the end of last year, has maintained its industry lead, adding five newspapers to its network in January alone. "We're going to explode in 1992," says APD chairman Stan Henry, who is personally bankrolling the expansion. "We're over the hump, and all the things we said were going to happen are happening now."

LOCAL COMPANIES ARE LEARNING HOW TO MAKE THE PROGRAM PROFITABLE.

PE has proven itself an equal in hyping its activities, although it continues to trail APD in the number of markets it serves, with 12 on board early this year. The company, which is backed by nine media conglomerates led by Time Warner, had been perfecting a high-tech delivery system in Atlanta for two years. But after it began rolling out nationally at the beginning of 1991, the company dropped plans to set up subsidiaries nationwide, which was considered far more costly than contracting delivery to local newspaper carriers.

"Right now, the outlook is very bright," says James O'Brien, PE's chief executive officer. "Mailers have been flocking to alternate delivery. The increase in interest has been phenomenal. We are still growing."

Beyond the flurry of press releases about market growth, the two competitors have become more and more alike when it comes to working with magazine publishers. "We have every copy we can in both systems and plan to expand as fast as they can," says Diane Potter, vice president of circulation for Times Mirror Magazines. "Both companies are running smoothly."

Even so, Thompson contends that the private delivery industry is still in its infancy, having only recently shifted from an emphasis on sales and marketing to nuts-and-bolts operational concerns. Despite publishers' apparent commitment to private delivery, its long-term success is very much dependent on the viability of hundreds of local delivery companies nationwide. Only in the past year have the local delivery companies begun to learn how to make the program work—and be profitable.

"What you have are 400 to 500 start-ups nationwide," Thompson explains. "This is a deceptively simple business, and I see people doing things that are too expensive or too complex. I will be shocked if we don't see attrition. Some will pull out and some will fail." Last November, for example, publishers of 24 monthly titles had to re-label their magazines and put them in the postal system after a local delivery company in Buffalo dropped out because of a dispute about how frequently its carriers made deliveries.

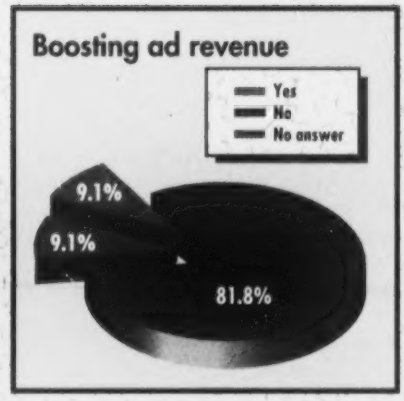
The question of delivery frequency could be an important one in the coming year, since PE builds its system primarily on weekly publications and APD emphasizes monthlies. "The frequency issue has an effect on PE's costs and raises the question of the profitability of the delivery companies," says Bob Inhofe, a former director of distribution at Meredith Corporation, whom some have called "the godfather" of private delivery. He worries that monthly magazines are paying for more costly service than they require, and are essentially subsidizing time-sensitive publications that do demand such service.

Developing uniform standards

The simple idea of home delivery is complicated by—but not yet hampered by—a lack of standards. Each network-builder continues to use different coding and labeling systems, with APD opting for detached cards that are tossed into the delivery bags,

Those who currently use alternate delivery experience about an 11 percent reduction in their annual second-class mailing costs.

Respondents who've tried alternate delivery report that an average (median) of 21.3 percent of subscriptions are sent via private channels.



Ride-along supplements and fliers have not proved attractive as an ad-revenue booster, although the methodology for value-added marketing with alternate delivery is still being developed.

and PE labeling each piece for its specific household. Both systems are designed to have minimal impact on current fulfillment operations. Over the past 18 months, for instance, most major fulfillment houses have adopted the labeling software necessary to divert subscriber copies from the mail-sort and place them in the delivery sequence for either network.

More markets opening up

Initiating the process can take a few weeks, says Dave Peterson, a vice president with Worlco Data Systems, a Valley Forge, Pennsylvania-based fulfillment house, but "it's easy to turn on another city" as additional markets open up and more pieces are taken out of the mail.

With more markets opening up, APD has begun to develop what it calls a "hub" system. By clustering distribution to affiliates that operate in the same state or region, says Phil Miller, APD's president, it will be possible "to make transportation more efficient and cheaper" and pass on further savings to publishers.

Although private delivery is viewed primarily as a pricing alternative, it can also offer publishers more timely and higher quality service than the USPS. With APD and PE, it is possible to monitor performance through monthly reports on when magazines arrive at the delivery company and when they reach the homes.

"We get faster, more consistent delivery," says Dan Lawrence, a distribution analyst with K-III Magazines, which has about 5 percent of its total monthly volume in alternate delivery. "With the post office, you don't have any control—and the speed of delivery can fluctuate up to a week."

Private delivery contracts with magazines allow for no more than one complaint per 1,000 copies delivered. Publishers report that not only is the standard being met, but the chief complaint has little to do with the quality of delivery. Because federal law prohibits private companies from placing magazines in the mailbox, they are delivered in plastic bags to the door or sometimes tossed on the ground. "Some object in principle, and others worry about bags left on the front lawn," says Diane Potter of Times Mirror, "but the volume of complaints is insignificant."

'WE CAN DO WHAT THE POSTMAN CAN'T, AND THAT'S SELL MORE ADS.'

Newsletter publisher Stephen Thompson, who has also consulted on delivery operations in several cities, says that a 50,000-household system operating in Dallas since last September received requests from only 55 people asking for mailbox delivery. "That's peanuts," he says.

Value-added marketing

While there have been rumblings among private delivery companies about seeking access to the mailbox, many industry experts believe this prohibition can be turned into an advantage for publishers, catalogers and others now turning to alternative systems. The reason: Private delivery also offers marketing opportunities that would be impossible or cost-prohibitive through the USPS. By removing these advertising pieces from the bulk of the mail stream, the argument goes, they get more notice.

"The big issue now is value-added programs," says Stan Henry of APD. "We can do with a private delivery system what the postman can't do, and that's sell more ads."

Until now, this has generally meant that a delivery company is able to sell local advertising based on the demographics of the magazines it delivers—a flier for a sporting goods store, for example, goes only to households that receive sports-oriented publications. These ads are sold by the local delivery company either against groups of magazines (men's and women's are the most typical groupings) or against specific titles.

Publishers receive no compensation for this form of "list rental," and both APD and PE are reluctant to let them tap into this revenue stream since it incentivizes the local delivery services. Rather than nickel-and-dime the delivery companies for a share of this revenue, they say, magazine publishers themselves should take advantage of this channel for new marketing opportunities that go beyond the printed page in a magazine.

"We're really concerned about ex-

tending our advertising messages," says Jerry Kaplan, publisher of *Better Homes and Gardens*, which delivers about 5 percent of its 7.4 million subscriber copies through private delivery. "Any time you talk about helping advertisers sell more, you get their attention."

Cents-off coupons, recipe booklets, new product samples and even a ticket offer for a sporting event sponsored by an advertiser have been delivered with Meredith Corporation's *Better Homes and Gardens*, working with packaged goods manufacturers, says Barbara Cops, the magazine's senior merchandising specialist. The number of pieces for each ride-along program has ranged from 1,000 to about 25,000, with the magazine negotiating a per-piece fee through APD and PE. "None [of the programs] has been so large that we weren't able to absorb the added costs," Cops says. "Otherwise, we would rebill the advertiser at cost."

'THE BIG ISSUE NOW IS VALUE-ADDED PROGRAMS.'

"A lot of marketing will tie into magazines and a lot of it will be completely apart from magazines," Inhofe says, adding that he believes there are greater marketing opportunities with monthlies because they generally have a more targeted readership and there's more time to sell against specific titles. "I think value-added marketing is absolutely vital to the future of private delivery."

Business-to-business

While APD and PE have become "household names" in the private delivery industry, at least three other companies are taking a stab at networks for trade publications.

The most extensive is National Delivery Service (NDS), a Dow Jones subsidiary based in Chicopee, Massachusetts, that for over 15 years has delivered *The Wall Street Journal* in more than 200 markets every business day. NDS currently handles 14 non-Dow Jones publications.

The other two companies with a national reach are Washington, D.C.-based National News Service (NNS), which delivers primarily newsletters originating in the nation's capital area, and New York-based Nationwide Alternate Delivery Alliance (NADA), a group of distributors in 53 major markets.

Officials of all three concede that their prices may not beat the USPS, yet they stress that for trade publications, timeliness and service reliability are more significant concerns. "I'm not cheaper than the Post Office, but what we deliver is time-sensitive material," says Stephen Schuster, director of NNS. "If it's not there on time the material becomes dry and doesn't have the same meaning to the subscriber."

NNS might charge anywhere between 15 cents and $1 per piece for newsletters, Schuster says, but because these publishers typically have high sub rates, they don't balk.

Mitchell Newman, an officer with NADA, also boasts of greater flexibility in particular markets. In late 1990, for instance, NADA began delivering *Variety* in New York and California by 7AM Sunday morning, a day before the publication hit the newsstands. "It's an enhancement for our key subscribers," says *Variety* distribution manager Bill Cunningham. Top film industry executives located in those markets now have a full day to digest the magazine before it's widely available via the USPS.

Of the three business-to-business operations, only NDS has been pushing the idea of marketing tie-ins. Last year, in conjunction with an ad for *Rolling Stone* that ran in *Advertising Age*, NDS also delivered a 45 RPM and a compact disc to New York subscribers. "The first thing everybody wants to talk about is price," says Michael Marvaso, national circulation manager for Dow Jones, "but I think we're seeing now a more serious approach to matching service with publisher needs."

Stephen Thompson of "Optimum Delivery" says that NDS is the "most credible" of the business networks because of its size (it goes to nearly 900,000 homes and businesses), its affiliation with Dow Jones, and its longevity in the private delivery business. NNS is a much more limited network—with only about 40 percent of its 50,000 pieces that are delivered daily going outside Washington—but Thompson praises its frankness about its operation.

He is more critical of NADA. Thompson claims he once phoned the magazines that were said to be delivered nationally and found out that they were delivered only in New York. NADA's Newman counters that while the bulk of the 100,000 pieces he delivers weekly are to New York addresses, he has the capability to distribute nationwide.

"Clearly, you have to determine if any of the three have the capabilities you need," Thompson says. "It's important to get a list of customers and confirm that they are satisfied."

The coming year

In order to fend off the challenge of private delivery, Associate Postmaster General Ken Hunter points to rate incentives for pre-sorting and the creation of task forces with mailers that will make the USPS "more responsive to customer needs." He also argues that new barcode reading technology for flats, which should be online later this year, will lead to further discounts. And beyond a price war, he says, the other critical front involves convincing USPS employees that "the best way to beat it is with service."

Industry experts say they are not rooting for the USPS to fail at controlling its costs, but Inhofe worries that if the USPS is successful, it could again doom private delivery. He cites testimony by Time Inc. Magazine Co.'s president Reg Brack, who told the Postal Rate Commission that if the USPS keeps future rate filings in line with inflation, "then yes, we probably would discontinue [Publishers Express], because there would no longer need to be a reason for it."

"If Reg Brack had said that no matter what the Post Office does, we're in private delivery to stay, then I would say [the industry] is over the hump," Inhofe says. "But he gave the game away: If you guys can control costs, we'll get out of it."

While for some publishers and others who are part of the Publishers Express network that's disturbing to hear, for Stan Henry at competitor APD, it's sweet music. But it would appear that before the publishing industry can join the chorus of support for alternate delivery, everybody has to be singing the same tune. ■

1992 Printing and Distribution Trends

Assertive publishers cut new deals with printers and paper suppliers.

In this time of marginal ad sales and rising postal rates, publishers can use any type of break they can get. Luckily for them, 1992 is the year of reduced printing and paper expenses, according to FOLIO:'s latest survey of consumer and trade production executives.

Of the production execs surveyed who had printing contracts up for renewal in 1991 or in the early part of 1992, more than half say their printers either cut their prices or maintained current rates. Another 30 percent of those who did not face contract renewals nevertheless attempted to renegotiate printing costs; most were successful in doing so.

The statistics beg the question: If so many of those who have bothered to renegotiate have been successful, why aren't more publishers doing it? Indeed, about 70 percent who did not have contracts up for renewal apparently did not approach their printers, according to our exclusive survey.

This isolated fact can distort the total picture, explains Steve Frye, a consultant on production issues. "Printers are scared to have their clients out looking for bids," he explains. Some suppliers are approaching clients well in advance of expiration dates to offer cuts that take effect six to nine months before a contract is even up for renewal.

All printers are feeling the pressure to keep their presses rolling. Because of computerized technology and the advent of the mini-web press, larger printers, who once shunned runs of 500,000 or less, can now take smaller runs. These firms are either adding equipment to handle the spate of smaller circulation, special-interest, niche and trade titles, or are buying divisions that already serve these clients.

The fierce competition for customers has left printers most eager to be good business partners. In addition to offering price breaks, most are learning they must also design competitive distribution plans to help publishers save on postage.

"Any production person is getting two or three calls a day from printers trying to sell something. The more capacity printers have, the more their salespeople are out drumming up new business," says Michael Arpino, director of production for Cahners' consumer entertainment division, New York City.

How much a publisher can save on printing costs obviously depends on page volume and how well he or she can negotiate. During this year of idling presses, some publishers have seen reductions of 10 percent or higher, says Frye.

Southam Business Communications, Inc., USA, Indianapolis, publisher of trucking magazines, convinced its printer to reduce an annual 5 percent price increase to only 3 percent. The trade publisher did agree to pay more for some of the pre-press services, however, but still walked away with "sizable savings" on the printing bill for all of its titles, says Dallas Nauert, director of production and printing.

Cost-cutting on the home front

Don't forget to get your own house in order, intones Jerry D'Elia, vice president of printing and transportation for Hearst Magazines Division, New York City. Before approaching a vendor for savings, publishers should examine what they can do to create savings without jeopardizing readership or ad sales. Hearst has adjusted four-color use, tints and paper grades. "Does the reader really see these things?" he asks rhetorically. D'Elia likens the production standard to an octane rating.

"If my consumer is content with an 89 rating, why pump 91 into the product?" he asks. For Hearst, dropping the octane level translated into eliminating cover coatings on *Country Living*, *House Beautiful* and at times on *Good Housekeeping*.

D'Elia is not alone. This year's FOLIO: survey finds almost 50 percent of publishers using a cover coating, with the most popular being the UV-cured coating; last year's survey showed that 62 percent were using some type of coating.

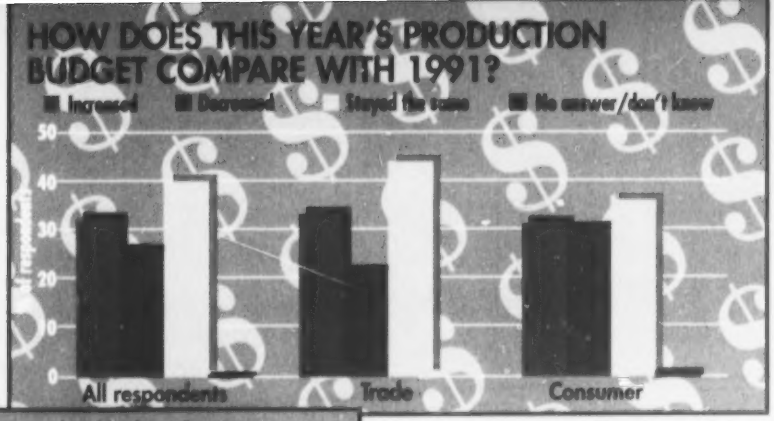
Paper also came under scrutiny this year. At The Taunton Press in Newtown, Connecticut, unit costs were kept even with last year by reducing trim sizes on *Fine Gardening* and *Threads* and switching from 55-lb. to 50-lb. text stock, notes Kathy Davis, director of manufacturing.

But,while 1992 is the year to rene-

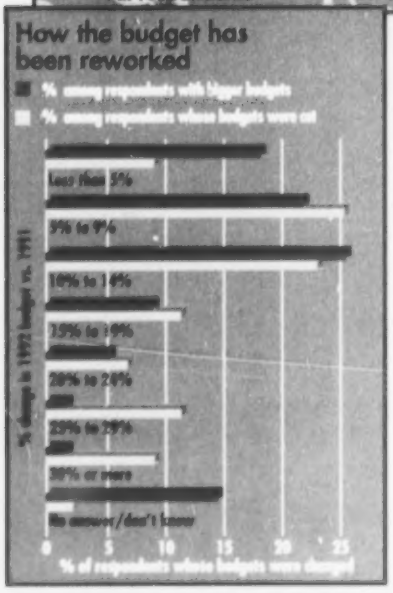
By Jean Marie Angelo

Methodology

Research USA, Inc., Chicago, conducted telephone research for FOLIO: from February 12 to 18, 1992. A total of 269 production executives throughout the United States were contacted on a random, nth-name basis to yield 165 completed questionnaires. Eighty-three of the respondents work for trade magazine publishers; 82 for consumer publications. Each respondent was asked for data pertaining to the magazine that is his or her primary responsibility. Executives responsible for more than one title based answers on the magazine with the largest pressrun.



◀ Although most production execs are working with the same budget as last year, almost one-third have more financial resources available. Just 26.1% had budgets cut. A larger number of consumer magazine executives than trade title execs are tightening their belts. FOLIO: interviews indicate increased budgets resulted from decisions to improve paper grades, four-color and other enhancements.



◀ Of all respondents, those with bigger production budgets are spending about 10.4% more on printing, paper, four-color, new equipment and other resources. While now is a good time to save on printing and paper costs, some respondents are adding more four-color or even a fifth color. Some with extra money in the paper budget may be buying heavier papers or testing recycled grades, which sell for 20% to 30% more than other publication papers. Those who have pared budgets are spending 13% less. The four most popular targets for reduced spending are paper, printing, four-color and staff. Interviews with selected executives indicate this group is cutting paper's basis weight and four-color.

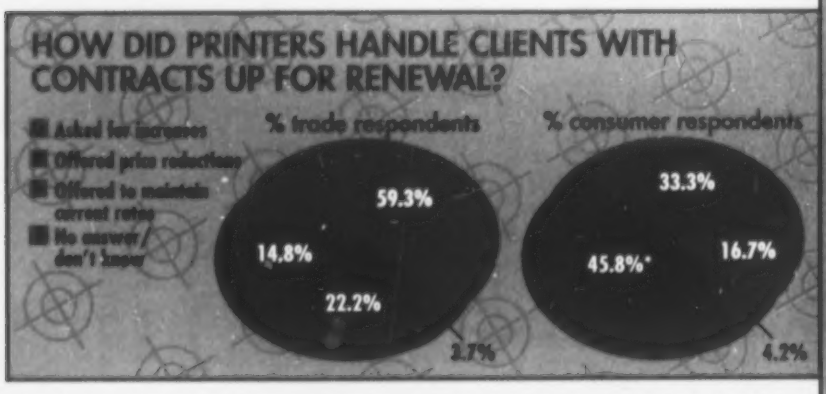
PAGE-COUNT PROJECTIONS

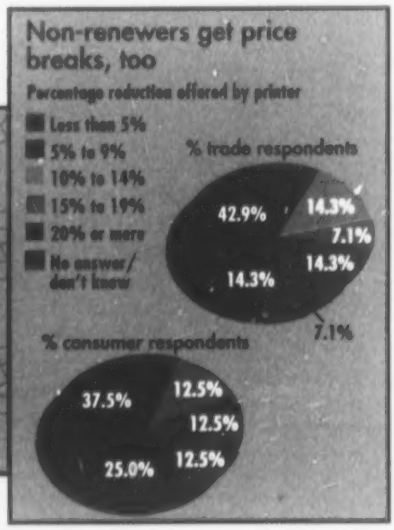
34.5%
of all respondents expect to run more pages this year.

58.2%
expect to be on par with 1991.

7.3%
anticipate running fewer pages.

▲ Trade magazine executives are slightly more pessimistic about page counts, with 13.3% expecting to run fewer pages in 1992 than they did last year. On the whole, all respondents planning to produce fatter magazines this year anticipate a page count rise of 11.9%. Those bracing for a decrease project a page count drop of 10.0%.





▲ Printers are doing what they can to hang onto their clients. Most either held rates or cut them, according to the 51 production execs who had contracts up for renewal during 1991 or the first two months of 1992. Printers who did raise prices asked trade publishers for a median increase of 2.5%; the hike for consumer publishers was 6.3%. Printers offering reductions shaved 5.0% off the printing bill for trade publishers and 6.7% for consumer publishers. Slightly more than 18% of production executives were unhappy with what their printers offered and switched vendors.

* The consumer respondents who were asked for increases would appear to be among the smaller-run (association, scientific and educational) publications.

▲ Of the 110 respondents whose contracts were not up for renewal, only 28.2% report trying to renegotiate printing costs (more than two-thirds of those who tried were successful). Fully two-thirds of business magazine execs and three-quarters of consumer magazine respondents failed to renegotiate. Of those that did, trade magazines knocked a median 8.8% off their printing bills; consumer magazines reduced costs by 7.5%.

gotiate with suppliers, it apparently isn't a time for publishers to embrace innovation. Less than 20 percent of the magazine publishers surveyed are using selective binding to tailor advertising and editorial for their readers.

"Printers have spent millions adding this technology, believing magazines would use it," observes Russ Shores, a consultant to both printers and publishers. The industry has watched *Time*, *U.S. News & World Report* and now *Newsweek* indicate that they are moving in this direction, but what is holding up the majority of publishers? Lack of sophisticated databases, says Shores.

"Publishers have to know who their subscribers are, how much they make and what they do for a living," he says. "Most can't tell you." For selective binding to take off, publishers will have to see the value in doing more than collecting a subscription payment or asking for minimal information on a response card. They must go after demographic data.

Still, 16.7 percent of production execs surveyed expect to use the technology within the next 12 months. Crain Communications, Chicago, publisher of *Ad Age*, *Automotive News* and other trade titles, is looking at circulation as well as advertising applications, says Bill Strong, vice president of circulation. Readers will be prompted to renew, or told when they are receiving their last issue, in addition to getting tailored ads.

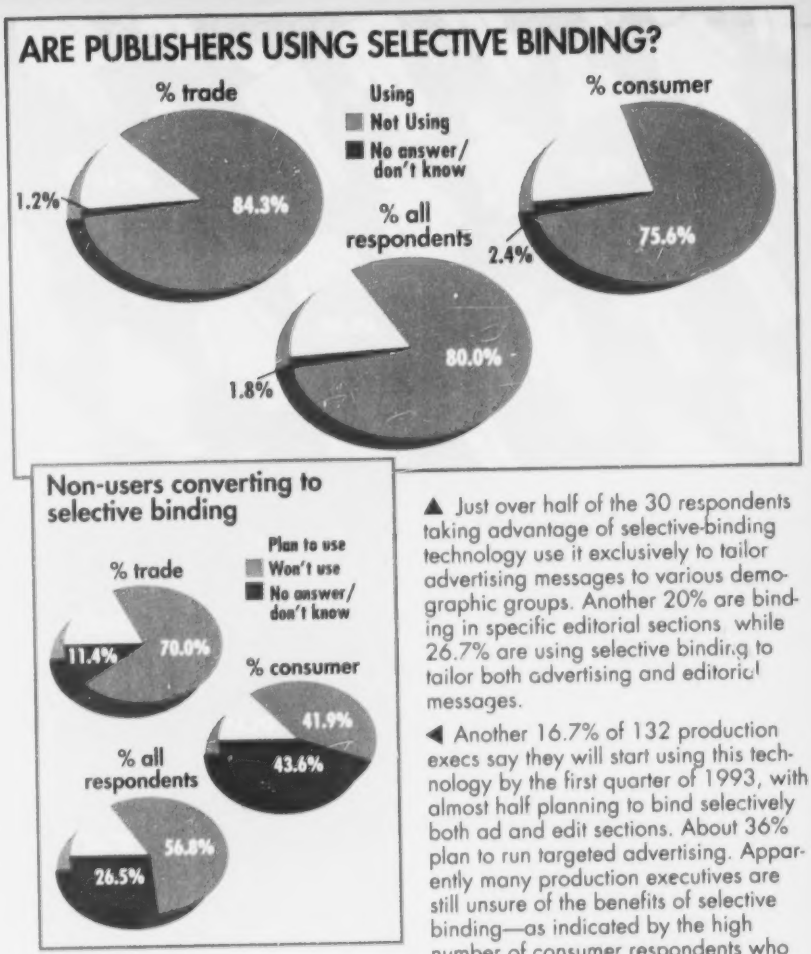
This trade magazine publisher's strategy is significant considering that, unlike the major consumer publications, it will be segmenting already relatively small pressruns.

Don't get smug

As the industry struggles toward economic recovery, suppliers will no doubt continue to push product-enhancing services, such as selective binding, while remaining flexible on pricing.

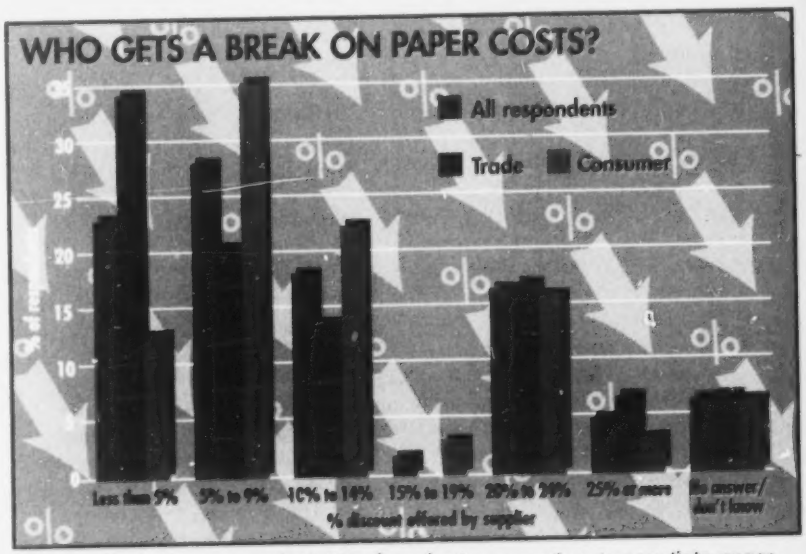
But there is also a danger in squeezing vendors too hard. "It hurts in the long run. You want your vendors to make a profit, not a large one, but a profit nonetheless," says consultant Frye. "If vendors are pushed too hard they will either sell out or close their doors, leaving a handful of major companies serving the publishing industry."

This is no time for production executives to be smug. Cautions Frye, "Publishers have to take advantage of low printing and paper costs now. We are at the bottom; there is no place for prices to go but up." ■



▲ Just over half of the 30 respondents taking advantage of selective-binding technology use it exclusively to tailor advertising messages to various demographic groups. Another 20% are binding in specific editorial sections, while 26.7% are using selective binding to tailor both advertising and editorial messages.

◀ Another 16.7% of 132 production execs say they will start using this technology by the first quarter of 1993, with almost half planning to bind selectively both ad and edit sections. About 36% plan to run targeted advertising. Apparently many production executives are still unsure of the benefits of selective binding—as indicated by the high number of consumer respondents who simply don't know where they stand. Those adamant about not using selective binding say it is unnecessary, or too expensive. Others report their audiences are homogeneous, making segmentation of circulation lists unnecessary.



▲ The paper glut prompted 41.8% of production executives to negotiate paper price cuts—or price cuts were offered by suppliers. Almost 90% of those asking for discounts were successful. Trade magazines report a median price reduction of 7.9%; consumer magazine publishers are paying 9.8% less.

SOSO DESIGN